



**State of Rhode Island and Providence Plantations
Office of the Secretary of State**

Fee: \$20.00

Division Of Business Services
148 W. River Street
Providence RI 02904-2615
(401) 222-3040

**Non-Profit Corporation
Annual Report**

Filing Period: June 1 - June 30

In accordance with R.I.G.L. 7-6-94, each corporation failing or refusing to file its annual report within the time prescribed by law (R.I.G.L. 7-6-91) is subject to a penalty fee of \$25.00.

ANNUAL REPORT YEAR: 2017

1. Corporate ID No. 000112943

2. Name of Corporation CFA Society Providence

3. State of Incorporation

State: RI

ARTICLE III

Using the dropdown labeled NAICS Code below, select the classification title that describes the primary type of activity in which your entity engages. The box to the right of the dropdown will populate a NAICS Code based on the chosen selection. If the NAICS Code is known, enter it into the box on the right. For further assistance with selecting a classification [click here](#).

NAICS Code
813920

4. Corporate Address in Rhode Island

No. and Street: P.O. BOX 41027
City or Town: PROVIDENCE State: RI Zip: 02940 Country: USA

5. Foreign Corporation. Enter Principal Office Address

No. and Street:
City or Town: State: Zip: Country:

6. Brief Description of the Character of the Affairs Which are Actually Conducted in Rhode Island

TO PROVIDE A FORUM FOR INVESTMENT RELATED INFORMATION AND EDUCATION
ALSO TO ENGAGE IN OTHER ACTIVITIES PROPER FOR ANY ORGANIZATION UNDER
SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE OF 1954

7. Names and Addresses of the Officers and Directors:

All officers and directors must be listed. If officers and/or directors have been elected, the title

Incorporator is no longer applicable; please delete

THE NUMBER OF DIRECTORS OF A DOMESTIC(RHODE ISLAND)CORPORATION SHALL NOT BE LESS THAN THREE(3). R.I.G.L. 7-6-23

Title	Individual Name First, Middle, Last, Suffix	Address Address, City or Town, State, Zip Code, Country
DIRECTOR	DANIEL PINHEIRO	U.S. TRUST 100 WESTMINSTER STREET PROVIDENCE, RI 02903 USA
DIRECTOR	LIU WANG	PROVIDENCE COLLEGE 1 CUNNINGHAM SQUARE PROVIDENCE, RI 02918 USA
MEMBERSHIP CHAIR	MARCIN KROLIKOWSKI	PROVIDENCE COLLEGE 1 CUNNINGHAM SQUARE PROVIDENCE, RI 02918 USA
ASSISTANT PROGRAM CHAIR	ALFONSO CUMPLIDO	935 JEFFERSON BLVD STE 2000 WARWICK, RI 02886 USA
PROGRAM CHAIR	KEVIN ARRUDA	U.S. TRUST 100 WESTMINSTER STREET PROVIDENCE, RI 02903 USA
TREASURER	LIU WANG	PROVIDENCE COLLEGE 1 CUNNINGHAM SQUARE PROVIDENCE, RI 02918 USA
SECRETARY	DANIEL PINHEIRO	U.S. TRUST 100 WESTMINSTER STREET PROVIDENCE, RI 02903 USA
VICE PRESIDENT	DANIEL PINHEIRO	U.S. TRUST 100 WESTMINSTER STREET PROVIDENCE, RI 02903 USA
PRESIDENT	BRIAN PACHECO	100 AMICA WAY LINCOLN, RI 02865 USA
DIRECTOR	LAWRENCE WAGNER	ROCKLAND TRUST COMPANY 100 SLADES FERRY AVENUE SOMERSET, MA 02726 USA
DIRECTOR	MATTHEW WELD	U.S. TRUST 100 WESTMINSTER STREET PROVIDENCE, RI 02903 USA
DIRECTOR	JONATHAN BURKE	100 AMICA WAY LINCOLN, RI 02865 USA
DIRECTOR	JOHN MATTERA	U.S. TRUST 100 WESTMINSTER STREET PROVIDENCE, RI 02903 USA
DIRECTOR	VICTORIA POMERLEAU	100 AMICA WAY LINCOLN, RI 02865 USA
DIRECTOR	SEAN MCGUIRK	40 WESTMINSTER STREET SUITE 202 PROVIDENCE, RI 02903 USA
DIRECTOR	BRIAN PACHECO	100 AMICA WAY LINCOLN, RI 02865 USA

**8. REGISTERED AGENT IN RHODE ISLAND - DO NOT ALTER
Changes Require Filing of Form 641 - R.I.G.L. 7-6-13 / 7-6-78**

PARTRIDGE SNOW & HAHN LLP 40 WESTMINSTER STREET, SUITE 1100 PROVIDENCE , RI 02903

9. This report must be signed by either the President, Vice President, Secretary, Assistant Secretary, Treasurer, duly Authorized Representative, Receiver, or Trustee.

Signed this 12 Day of June, 2017 at 8:48:22 PM by the authorized person. This electronic signature of the individual or individuals signing this instrument constitutes the affirmation or acknowledgement of the signatory, under penalties of perjury, that this instrument is that individual's act and deed or the act and deed of the company, and that the facts stated herein are true, as of the date of the electronic filing, in compliance with R.I. Gen. Laws § 7-6.

By DANIEL PINHEIRO
Signature of Authorized Person

Form No. 631
Revised 09/07

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